

choosing to invest a lump sum

HESTA

This form enables you to invest lump sums in different investment option(s) from the rest of your HESTA account balance. Lump sums can be amounts such as a large contribution cheque or rollover from another fund. Please note that any instructions you provide to subsequently alter the investment option(s) of your account balance will override this lump-sum instruction.

How to invest a lump sum

Attach your cheque or rollover application request to the completed form and send it to HESTA or BPAY (log in to hesta.com.au/login to access your BPAY details). Before you make any decisions about your investment strategy, we recommend you read HESTA's *Investment choices* (available at hesta.com.au/pds or call 1800 813 327) and consider seeking professional financial advice.

Complete all parts of the form in capital letters. Check you have signed and dated the form.

1 Change your current HESTA account balance

Member number:

Title: Ms Mrs Miss Mr Dr Other

Given name/s:

Family name:

Postal address:

PO Box / Unit number / Street number

Street name/Suburb

State/Territory

Postcode

Date of birth:

Gender: F M

Telephone number (home):

Mobile:

Email (optional):

2 Investment options

Conservative %

Balanced Growth (*MySuper*) %

Indexed Balanced Growth %

Sustainable Growth %

High Growth %

Cash and Term Deposits %

Property and Infrastructure %

Diversified Bonds %

International Shares %

Australian Shares %

Total (must add up to 100%) %

3 This instruction is to apply to these attached documents:

cheque amount \$

estimated rollover amount \$

from (name of super fund)

BPAY amount \$

Date paid

Reference number

4 Declaration and acknowledgement

- I understand the investment option(s) I have chosen in this form apply only to the lump-sum amounts nominated in Section 3, and will apply only if the payments are received by HESTA within three months of HESTA receiving this form. I understand my other fund may not immediately rollover my benefit to HESTA. I acknowledge that if HESTA receives the rollover payment later than three months after receiving this form, it will be invested in the same way as my regular cashflow/contributions
- I understand the lump-sum amounts nominated in Section 3 will become part of my HESTA account balance and acknowledge that any instruction to subsequently alter the investment option(s) of my account balance (including previous instructions that will not take effect until a future date) will then override this instruction

- I declare I have read and understood the information contained in HESTA's Investment Choices
- I acknowledge HESTA has advised me to consider obtaining financial advice
- I understand past returns are not a reliable indicator of future returns
- I have read and understood the HESTA Privacy Collection Statement and consent to the Trustee of HESTA collecting, using and disclosing my personal information.

Signature:

Date:

Return your completed form

Scan and email all requirements to hesta@hesta.com.au or mail to: HESTA, Locked Bag 5136, Parramatta NSW 2124

contact us

hesta@hesta.com.au | 1800 813 327 | Email forms to hesta@hesta.com.au or mail to: HESTA, Locked Bag 5136, Parramatta NSW 2124

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